

PAA TROUBLESHOOTING CHECKLIST

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PAA TROUBLESHOOTING CHECKLIST

Getting Started (Accounts, Log On, Hierarchy)

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
My Biz My Workplace Account/Password	<p>Need to establish access to My Biz</p> <p>Forgot your My Biz/My Workplace password</p> <p>Password has been reset, but still can't access My Biz/My Workplace</p>	<p>Follow the <u>My Biz User Information</u> at this link</p> <ul style="list-style-type: none"> • Use the security question process to reset your password, or • Go to the CPOL PORTAL, http://cpol.army.mil, open My Biz, go to My Biz/My Workplace Helpdesk and open the help desk ticket type "Reset Password". <p>Make sure you have established your secret security questions.</p>
Military Accounts	Military Rating Official does not have access to a My Biz/My Workplace Account	Ensure user has a DCPDS Account. TMs can build an external user record in the Hierarchy tool, and then the automated process will build the My Workplace account.
Accessing NSPS Performance Appraisal Application (PAA)	<p>Employee cannot Log On</p> <p>Rating Official cannot Log On</p> <p>Higher Level Reviewer cannot Log On</p>	Contact TM/CPAC/CPOC Helpdesk
Position Hierarchy	Wrong employees appearing or employees missing from Supervisor's My Workplace	Are names hidden? Click on "Next 5" or "Next" on the right hand side of your screen to view the rest of your employees.

PAA TROUBLESHOOTING CHECKLIST

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Position Hierarchy	<p>Wrong employees appearing or employees missing from Supervisor's My Workplace</p> <p>What is the "Position Hierarchy"</p>	<p>Contact your Transition Manager (TM) to have correct employees added or extra employees deleted.</p> <p>(Note: A Position Hierarchy (PH) tool has been developed to provide a single process for NSPS Transition Managers (TMs) and HR Specialists to build a position hierarchy in the PAA so that supervisors may access and modify only their employees for performance purposes. The PH also creates, edits, and attaches military/external personnel records and positions. The PH tool has been approved and is fielded to the Command TMs.</p>

PAA TROUBLESHOOTING CHECKLIST

Performance Plan (Creating, Modifying, Acknowledging, Approving)

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Performance Plan	<p>Rating Official (RO) receives the following error message when trying to initiate a Performance Plan: "Plan already exists" for that date. RO does not have another plan for employee on same date</p> <p>As above, but Employee or Losing RO is not available to transfer the plan</p>	<ul style="list-style-type: none"> Did Employee transfer the plan to RO? If employee initiates his/her own plan, RO will not see it until it is transferred to him/her. Request employee transfer plan to RO. Was a plan initiated by another RO? If another RO already initiated a plan for the employee, the new RO will not see it unless it is transferred to him/her. Request that the former RO transfer the plan to the new RO. If employee or former RO is not available to transfer plan, request your PAA Super-User to transfer or delete the plan.
Performance Plan	Employee cannot edit Job Objectives	<ul style="list-style-type: none"> Has Plan been approved? Employee can only edit job objectives if the plan was initiated by the employee and it has not yet been approved. Is employee adding objectives or modifying existing job objectives? After a plan has been approved, employee can add job objectives, but cannot modify an existing objective. Return plan to RO who can update or modify existing job objectives.
Job Objectives – Optional Weights	Employee cannot enter weights for Job Objectives	Has the Rating Official (RO) assigned weights? RO must enter weights for job objectives. If the employee initiates the plan, they must transfer the plan to the RO to enter the weights.
Performance Plan	Rating Official (RO) wants to retrieve plan/appraisal from employee but pencil is grayed out	RO can retrieve the plan/appraisal by clicking on the Details icon. There will be a "Retrieve Appraisal" button in the upper right corner of the appraisal detail screen.

PAA TROUBLESHOOTING CHECKLIST

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Performance Plan	<p>Rating Official (RO) cannot approve a performance objective</p> <p>Employee cannot acknowledge objectives</p>	<ul style="list-style-type: none"> Ensure all data fields filled out completely and correctly- <ul style="list-style-type: none"> The objective has a title The objective text is typed or pasted into the "Job Objective" box, not the "Working Version Job Objective" box. Contributing factors are selected Ensure the HLR approved the objectives. If not, send the performance plan back to the RO to forward to HLR for approval.
Performance Plan	<p>Rating Official receives the following error message when trying to approve the job objective(s):</p> <p>"Identify Job Objective in the Job Objective text box before you approve"</p>	<ul style="list-style-type: none"> Is "Job Objective" text block blank? - or - Was Job Objective typed in "Working Version" text box instead of "Job Objective" text box? <p>If so, copy and paste the objective into the "Job Objective" box before approving the objective(s).</p> <p>Note: Future changes to the PAA will eliminate the Working Version text box and eliminate this problem.</p>
Objectives – Display Order	Job Objectives are not listed in proper order	<ul style="list-style-type: none"> The primary sort parameter is effective date order of the job objectives. The secondary sort parameter is alpha-numeric order of the job objectives. It is recommended that users include a sequence number at the beginning of the job objective title. If all job objectives have the same effective date this will keep the list in the intended order.

PAA TROUBLESHOOTING CHECKLIST

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Performance Plan - Approval	Rating Official is unable to approve a performance plan	<ul style="list-style-type: none"> • Ensure all of the individual objectives are "approved" • Ensure the HLR has "approved" the plan • Ensure the employee has "acknowledged" the plan <ul style="list-style-type: none"> ○ Transfer the plan to the employee ○ Employee accesses the plan, clicks on "save and continue" and then "continue" ○ Under heading "approvals and acknowledgements" click on "acknowledge" button ○ Click on "save and continue" ○ Transfer plan to rating official • After HLR approves and employee acknowledges, the RO must: <ul style="list-style-type: none"> ○ Enter the date the RO and the employee discussed the objectives. ○ Identify how the plan was discussed with the employee (e.g., telephone or face-to-face). ○ Then finally the "approve" button will be available to approve the plan.
Performance Plan - Approval	User has accidentally entered the wrong date when approving performance plan	<p>Only the Rating Official can correct the performance plan approval date.</p> <ul style="list-style-type: none"> • Click "Appraise" icon under Plans/Appraisals in Progress. From the Rating Official Review Page, click "Update Plan/Appraisal" button. • Correct performance plan approval date. Click Apply. • From the Rating Official Review Page, under Setup Details, the performance plan approval date should reflect the correct date. <p>NOTE: Since the plan was approved, the Plan Phase will now reflect "Modified" instead of "Approved" since a change occurred after plan was approved.</p>
Performance Plan	Plan disappeared after the Rating Official completed it	<p>If appraisal been completed, it can be view under "Completed Plans/Appraisals" section. Choose "Annual Appraisal NSPS" as the type and click the "Go" button to view the completed appraisals. You will only be able to view 5 at a time, so click "Next" if there are more than 5.</p>

PAA TROUBLESHOOTING CHECKLIST

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Performance Plan - HLR	Higher Level Reviewer (HLR) is not the Rating Official (RO)'s supervisor in position hierarchy	RO should use the "Select Ad Hoc HLR" tool in the PAA to choose the HLR. This tool is visible after the RO clicks the "Transfer to HLR" button.
Performance Plan - HLR	Higher Level Reviewer (HLR) cannot see appraisal that has been transferred to him/her	<ul style="list-style-type: none"> • Ensure the "My Workplace Account" for the HLR has been correctly established. Contact servicing CPOC to verify set up. • If account is correctly established, request that your PAA Super-User return the appraisal to the Rating Official (RO) by changing the status to "Returned for Review". Ensure that the RO is sending the appraisal to the correct HLR.
Performance Plan - HLR	<p>Performance Plan or Appraisal has been transferred to Higher Level Reviewer (HLR) but HLR is unavailable to perform duties (separated, sick leave, etc?)</p> <p>- or -</p> <p>HLR shows as "Hierarchy, HelperSOGH"</p>	Contact your PAA Super-User and request appraisal status be changed to "Returned for Review". This will return the plan/appraisal to the Rating Official (RO). RO can transfer the Performance Plan or Appraisal to an appropriate ad-hoc HLR.

PAA TROUBLESHOOTING CHECKLIST

Interim Review

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Interim Review	Create Interim Review button not visible	Has Performance Plan been approved by the Higher Level Reviewer? Create Interim Review Button will not be available until plan is approved.
Interim Review – Employee Self Assessment	Employee cannot see Interim Review to enter self-assessment	Has Rating Official (RO) created Interim Review? RO must create an interim review before employee can enter an assessment.
Interim Review	Employee “Interim self assessment” has erroneously been entered in the "employee self assessment for annual appraisal" section	Does Employee have possession of Appraisal If so, cut and copy the information from the “employee self assessment for annual appraisal” and reenter in “Interim Review”.
Interim Review – Rating Official (RO) Assessment	Rating Official cannot see the window to create the interim review	Has Performance Plan has been approved? The interim review window will not show up until the Performance Plan has been approved.
Assessment – Text Field Limits	Interim and Annual Assessment text fields have a character limitation. The printed form also has a line limitation. What are the parameters	<p>Interim assessments should not exceed 2000 characters or 21 lines for both the employee and RO.</p> <p>Annual assessments should not exceed 6600 characters or 75 lines for the employee and 2000 characters or 21 lines for the RO.</p> <p>Note: Future changes to the PAA may change the text box size for the RO.</p>
Performance Plan - Assessments	Foreign or Special characters are displayed when text is cut and pasted from MS Word document	<p>There are two ways to correct this issue</p> <ul style="list-style-type: none"> • Before you type the assessment, disable the “Auto Format as you Type” feature in MS Word. Or type the document as a plain-text file. • If document is already typed, save it as a plain-text file (.txt), close and reopen the document, and then cut and paste the text.

PAA TROUBLESHOOTING CHECKLIST

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Interim Review – Higher Level Reviewer (HLR)	Uncertain who my Higher Level Reviewer (HLR) is if Commander or equivalent organization head is my Rating Official (RO)	If a Commander or equivalent organization head is the RO, he or she may also serve as a HLR. The HLR is appointed at the discretion of the organization.
Interim Review – Higher Level Reviewer (HLR)	HLR button is grayed out	Click the Auto populate button located above the HLR Request button.
Interim Review - Printing	Interim Review does not print on the DD Form 2906	<ul style="list-style-type: none"> • Has Performance Plan been approved? Make sure the HLR has approved the plan, the employee has acknowledged it, and the RO has approved it. • Check document for special characters. Special characters can prohibit printing.
Interim Review – Printing	Multiple Interim Reviews are printing	Have you requested print from current copy? The two most recent Interim Reviews will print on the hard-copy performance document. Extraneous or un-needed Interim Reviews cannot be deleted at this time. Ensure extra Interim Review data rows are blank and un-approved. Capability to delete extra Interim Reviews is expected as part of the August 2007 system update.

PAA TROUBLESHOOTING CHECKLIST

Mock and End-of-Cycle Assessments and Ratings

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Mock End of Cycle – Self Assessment	Employee cannot change their employee self assessment	Does Employee have possession of the appraisal? The employee can only delete the information from the "employee self assessment for annual appraisal" area if the employee has possession of the appraisal.
Mock End of Cycle – Rating Official Assessment	The Rating Official cannot correct completed rating	Has job objectives status been changed from Approved to Pending? As soon as the objectives are approved, the rating can be corrected.
Ratings	Rating Official has completed the ratings but then notices an incorrect rating. Rater tries to access the ratings by clicking on the blue pencil but cannot change the ratings	Ensure the job objectives are still in the approved status. If objectives are in the pending status, approve them and rating can be corrected.
Annual Appraisal	Employee received a performance pay out, but separated before Rating Official was able to complete his/her appraisal. Appraisal status is "Approved by PPM"	Contact your PAA super-user and request that the appraisal status be changed to "Completed".

PAA TROUBLESHOOTING CHECKLIST

Printing DD Form 2906

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Printing DD Form 2906	PDF File does not display after clicking on printer icon	Ensure the checkbox "print to file" is un-checked
Printing DD Form 2906	<p>The incorrect organization address is printing on DD Form 2906 in block 6</p> <p>- or -</p> <p>The organization printed is not the complete Position Organization Address (POA)</p>	If the organization string is wrong, contact your CPAC to have them verify your position build.
Printing DD Form 2906	Some fields of the DD Form 2906 are not printing	<p>There are two areas that allow printing of a version of the DD Form 2906 by clicking on the "Print" icon:</p> <ol style="list-style-type: none"> 1) The "Working Copy DD Form 2906" is displayed under Plans/Appraisal in Progress (My Workplace) or My Plans/Appraisals (My Biz), The "Working Copy" allows users to see "live" data what is currently in progress (Pending or Approved) or if transferred (does not have ownership), contains only information since the last transfer. 2) The final DD Form 2906 can be found under the Completed Plans/Appraisals area and shows approved areas. As a pivotal performance management event occurs (e.g, approved performance plan, approved interim review, etc.), a final DD Form 2906 is generated.

PAA TROUBLESHOOTING CHECKLIST

Special Situations

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Special Situations	Rating Official has departed without transferring performance plans to another Rating Official or Higher Level Reviewer	Contact your TM/CPAC Super User or CPOC help desk to have departed Rating Official's performance plans transferred to another user.
Special Situations	Employee has separated prior to getting a closeout assessment	Create Manual Closeout Assessment.

PAA TROUBLESHOOTING CHECKLIST

Transferring Performance Plan

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Transferring Performance Plan	Employee transferred the Performance Plan to the wrong Rating Official (RO)	Contact Super User or CPOC help desk to have departed RO's performance plans transferred to another user.

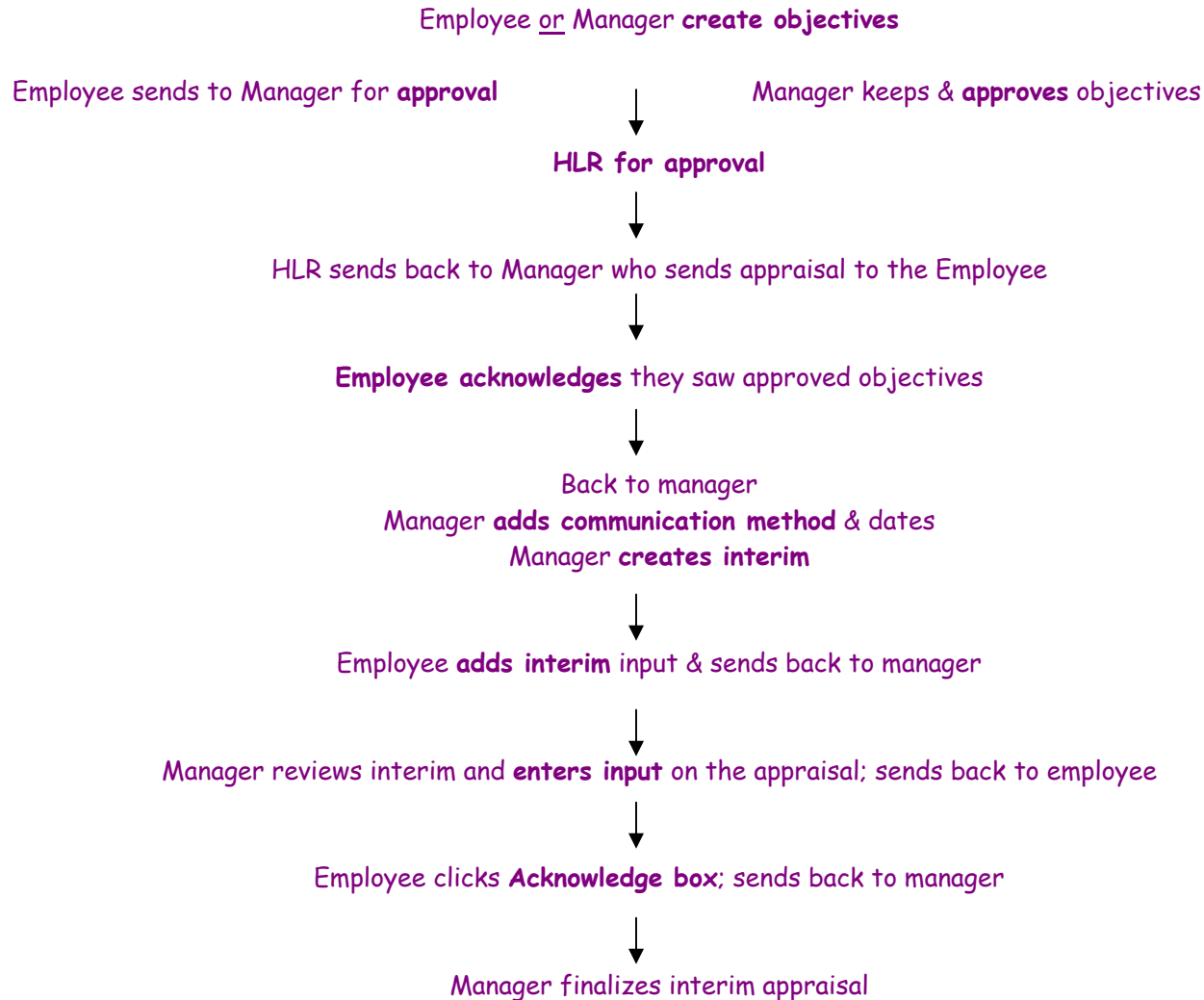
PAA TROUBLESHOOTING CHECKLIST

Super-User Tool

SUBJECT	ISSUE (If you Experience this ...)	SOLUTION (Then try this ...)
Super-user Tool	Can I use the Super-user tool to change a PAA status code	<p>Yes, There is a bug in the system, which has been reported to CPMS.</p> <p>But you can use the workaround below.</p> <ol style="list-style-type: none">1. Select the plan/appraisal you wish to modify and click update.2. Select the new status code using the LOV (drop down menu) but then click CANCEL.3. Repeat step one. The status code will still show what you changed it to in step 2.4. Hit update. Code will update to the value you set in step 2.

PAA TROUBLESHOOTING CHECKLIST

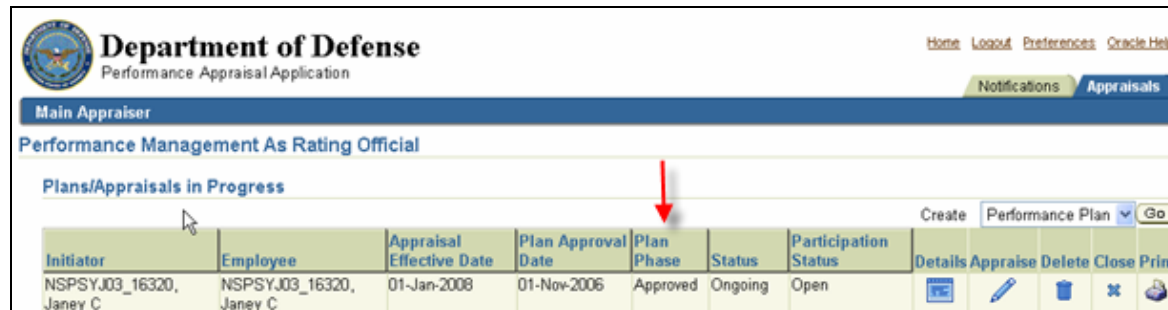
PAA Routing



PAA TROUBLESHOOTING CHECKLIST

PAA Performance Plan Phase Descriptions

There are five performance plan phases.



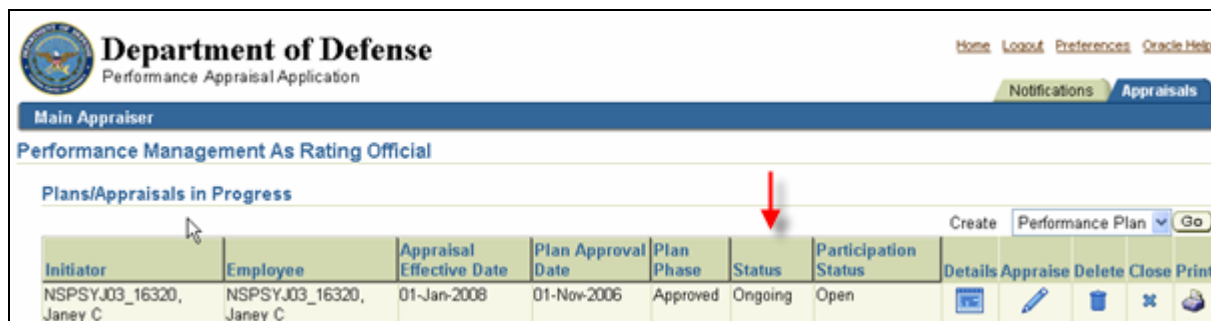
Plan Phases

Plan Phases	Description
Approved	Performance plan approved by rating official
Closed	Performance plan/appraisal has been closed by the rating official (i.e., due to employee getting a new performance plan, changing positions or separation prior to the end of the rating cycle).
Initiated	Performance plan has been initiated by either the rating official or employee but has not been approved.
Modified	Performance plan has an approved status and a subsequent change has occurred.
Pending	Performance plan initiated, saved during the creation but has not been transferred to employee/manager and has not been approved.

PAA TROUBLESHOOTING CHECKLIST

PAA Appraisal Status Descriptions

There are 11 appraisal status types.



Department of Defense
Performance Appraisal Application

Home Logout Preferences Oracle Help

Notifications Appraisals

Main Appraiser

Performance Management As Rating Official

Plans/Appraisals in Progress

Create Performance Plan Go

Initiator	Employee	Appraisal Effective Date	Plan Approval Date	Plan Phase	Status	Participation Status	Details	Appraise	Delete	Close	Print
NSPSYJ03_16320, Janey C	NSPSYJ03_16320, Janey C	01-Jan-2008	01-Nov-2006	Approved	Ongoing	Open					

PAA TROUBLESHOOTING CHECKLIST

Appraisal Status

Status	Description
Completed	The final rating has been approved by the pay pool manager (PPM). The rating official has annotated the date and method communicated with the employee.
Deleted	Performance plan/appraisal has been deleted by rating official.
Ongoing	Performance plan has been initiated and approved, but has not been routed to the higher level reviewer for approval.
Pending Approval	Recommended rating has been routed to the higher level reviewer for approval.
Pending PPM Approval	Higher level reviewer approved the recommended rating of record.
Planned	Performance plan initiated, saved during the creation but has not been transferred to the employee/manager or approved.
Approved by PPM	Recommended rating of record is final.
PPM Returned for Review	Pay pool manager has returned the appraisal for correction. (Note: This status can only be updated by the CIVDOD Performance Management Administrator. The administrator will unlock the record allowing the rating official to make changes.)
Returned for Review	Higher level reviewer has returned the appraisal to the rating official for modification.
Saved	Performance plan has been initiated. The user exited the build process at step 1 of the 3-step performance plan creation process.
Transferred	Performance plan/appraisal has been transferred to the employee.